CLIENT DEVELOPMENT TOOL

Your 90-Day Sprint Roadmap

September through November is a uniquely useful window to reconnect with the clients, prospects, and referral sources who matter most to your practice. Client priorities, budgets, year-end business demands, and 2027 plans are beginning to take shape. At the same time, fall conferences and year-end gatherings can create natural opportunities to see people in person.

This sprint is meant to help you focus on having better conversations with the right people—conversations that help you understand what is changing, identify where you can be useful, and create a meaningful next step.

START HERE

Your First 15 Minutes

01 Choose your sprint lane: Focused, Core, or Expanded.

02 Build your shortlist by pulling up your client list for the last three years, calendar, or CRM. Write down 10–15 names without judging them yet.

03 Use the three-question test to narrow down the list and identify your 90-day priorities.

TIMELINE

September

Choose your lane, build your shortlist, and complete outreach to schedule all of your meetings. The earlier in September you can complete outreach, the better.

October

Gather intelligence, hold the highest priority conversations, and start completing follow-up.

November

Finish lower-priority conversations, reconnect on October conversations where needed, close all open loops, and identify anything that needs to be carried forward to 2027.

SPRINT LANES

SPRINT LANE	SUGGESTED COMMITMENT	BEST FOR
Focused	**6–8 substantive conversations**	Lawyers with substantial billings for a solid book of existing clients who are focused on protecting existing relationships and incrementally expanding
Core	**8–12 substantive conversations**	Lawyers with established client development responsibility who need to accelerate growth for themselves and their teams
Expanded	**12–15 substantive conversations**	Practice leaders, office managing shareholders, relationship partners, and lawyers with client-team responsibilities who need to contribute to exponential growth

Important: These are planning ranges. Choose the level that allows you to prepare well, be fully present, and follow through.

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BUILDING YOUR SHORTLIST

Use the menu of categories below to plan your conversations. Select the relationships where a conversation this fall could create the most value for the client, for you, and for the firm.

CONTACT TYPE	WHO'S ON THE LIST?	CONVERSATION GOALS
Top Existing Clients	Clients with significant work, strategic importance, or relationships you need to protect and deepen	Seek feedback, strengthen trust, understand 2027 priorities, and identify service or value needs
Growth Clients	Clients with only one or two areas being serviced by the firm and with additional market needs	Identify broader relationship access, cross-practice needs, and opportunities for earlier involvement
At-Risk Clients	Clients with declining work, leadership changes, recently completed matters, service friction, or pricing pressure	Understand what changed, address friction, and protect the relationship before the next decision about external counsel
Former Clients	Clients you have not billed in two or more years whose business, industry, leadership, or legal needs may have changed	Restore relevance, learn what is different, and create a credible reason to stay connected
High-Priority Prospects	Prospects with a warm path, known trigger event, relevant connection, or clear strategic fit; you've already had multiple touch points with these contacts	Understand business priorities and legal needs; share something valuable
Referral Sources and Allies	Accountants, consultants, bankers, investors, board members, industry leaders, and other trusted advisors	Exchange market intelligence, deepen reciprocity, and identify relevant introductions

Use the three-question test

Before someone goes on the list, answer:

1
Why is this relationship important over the next 12 months?

2
What do I need to learn?

3
What can I share, offer, or do that may be useful?

If you cannot answer at least two of the three questions, the person may not belong on your 90-day shortlist—or you may need to do a little more preparation before reaching out.

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MY 90-DAY SHORTLIST

PERSON / ORGANIZATION	CATEGORY	WHY NOW?	WHAT I NEED TO LEARN	HOW I CAN BE USEFUL	CONNECTION PLAN / TARGET DATE

Use only the rows you need. A focused sprint with six well-prepared conversations is a successful sprint.

PREPARE FOR SUBSTANTIVE YEAR-END CONVERSATIONS

A substantive conversation teaches you something, helps the other person in a concrete way, or leads to a next step. The best conversations do all three.

Before each meeting, choose one thing to learn and one way you may be useful. Do not try to cover every topic in one conversation.

CONVERSATION MENU

PRIMARY CONVERSATIONS

1. Business priorities and outlook

Use these prompts to understand what is changing in the client's organization, market, or leadership agenda.

- How does legal fit into the broader strategy of your organization right now?
- Are there changes in strategy, leadership, growth plans, workforce, operations, financing, regulation, or competition that we should understand better? *Note: Pick just a couple of areas to focus on.*
- What is likely to demand the most attention between now and year-end?
- Any trends or industry shifts you're keeping a close eye on?
- What is already beginning to take shape for 2027?
- Where is the business seeing the greatest uncertainty, pressure, or opportunity?

2. Legal needs and risk

Use these questions to move beyond the active matter and understand where earlier legal input may help.

- What legal, regulatory, operational, or commercial risks are most concerning right now?
- Where could earlier legal involvement help reduce cost, risk, or delay?
- What is taking more time or attention from your team than it should?
- Are there areas where your internal team would benefit from additional capacity, specialized experience, or more proactive guidance?

3. Client service and relationship feedback

Use these prompts to make the relationship easier and more valuable to manage.

- What are we doing especially well for your team?
- Where could we make your job easier?
- Is there anything about our communication, responsiveness, staffing, or invoicing that we should revisit?
- Do you receive the right amount of information at the right time?
- What would make the outside counsel relationship more useful over the next year?

4. Value, budget, and pricing

Use these questions before annual rate discussions—not as a negotiation, but as a way to understand the client's needs and decision process.

- As you look toward next year, where would more budget certainty be most useful?
- What creates the most friction in managing outside counsel spend?
- How would you prefer us to communicate if scope, staffing, or timing changes?
- Are there types of work where a phased budget, fee cap, fixed fee, blended rate, or more frequent forecast would help?
- Aside from the legal work, where are you seeing extra value from your outside counsel bench?

SITUATIONAL CONVERSATIONS

5. Relationship growth and introductions

Use these questions when it is appropriate to broaden your understanding of the client organization or connect the right people.

- Are there people, business units, or leadership teams we should understand better?
- Would it be useful to introduce a colleague or provide a short practical update on any of the issues we have discussed?
- Who else in your organization is likely to be focused on these issues next year?

6. Prospect and referral-source intelligence

Use these questions with prospects, referral sources, and industry contacts.

- What are you seeing in the market that outside counsel should understand better?
- What makes a law firm genuinely useful to the people you advise?
- Where are clients struggling to find the right support?
- What would be useful for me to know about your priorities over the next year?

FOLLOW UP WITHIN 48 HOURS

The meeting is not complete when the conversation ends. Within 48 hours, record:

AFTER THE CONVERSATION

What did I learn?

What did I promise or offer to do?

What is the next step?

Who needs to be involved?

What is the due date?

What does this change about how I serve, price, staff, or pursue the relationship?

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Within 48 hours send a thank-you email to your contact with an outline of the items you promised. You don't have to have every single item ready that you discussed during your meeting before sending the note. Block time 2–4 weeks after your meeting to ensure you wrap up any loose ends.

> Do not let a useful conversation erode trust because you didn't follow through. The follow-through is what turns client intelligence into stronger service, deeper trust, and real momentum.